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Trends in Australia

Survey on Consumer Shopping

1990

TRENDS IN AUSTRALIA

Survey On Consumer Shopping **1990**

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The Australian Supermarket Institute is the national organization representing retailing, both food and general, in Australia. The Association is supported by state retail traders associations, by national retail companies and by wholesale grocery companies. Its membership covers 12,000 companies with 35,000 stores. The chain and independent supermarket members of the Association have a combined sales volume of $19 billion, which is at least 90% of all supermarket business in the country. The Association has strong working relationships with kindred associations in the Asia/Pacific region, being a foundation supporter of the biennial Asian Retailers Conference.

The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 member -- food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion -- more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 210 members from over 55 nations.

INTRODUCTION

This report is a study of the shopping habits and attitudes of the Australian consumer. It was conducted to provide food retailers and wholesalers with a better understanding of their customers.

Throughout this area as in other regions of the world, consumers are becoming more interested in quality and selection of products, the result of better communications and logistics, higher disposable income and more leisure time. Women throughout the world are increasingly joining the work force with the inevitable consequences for retailing in product selection, services, expanded store hours, and in competition from restaurants and convenience stores.

A companion study on the concerns of food retail and wholesale top management around the world, as well as information on store operations in the Asian/Pacific region is also available. *The State of Food Retailing and Distribution: Issues and Opportunities Around the World* is the first such research report done on an international basis.

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INTRODUCTION

In May 1990, the Food Marketing Institute initiated its first survey of Australian consumers' attitudes and behavior with regard to supermarkets. The results are summarized in this report and cover the following main topics:

- An overview of shopping behavior, including types of stores shopped for various food products.
- Expectations and evaluations of supermarket performance.
- Consumer expenditures in supermarkets and steps taken to economise on food bills.
- Shopping patterns such as numbers of stores shopped, store switching, frequency/day/time of shopping and, time-saving methods.
- Consumer attitudes toward nutrition and food safety.

A demographic profile of the sample appears in the methodology section of this report.

The Food Marketing Institute has conducted a similar survey of American shoppers starting in 1974. The results of these studies are published each year in Trends -- Consumer Attitudes and the Supermarket.

Study Design

The data for this survey are based on telephone interviews with an Australia-wide, nationally representative probability sample of 1020 men and women mainly responsible for the household's food shopping. Interviews were conducted May 8-11, 1990.

A Note on the Tables

Directly beneath the title of each table is the wording of the question exactly as asked as well as a description of the base -- that is, the respondents asked the question. The exact number of respondents in the base group -- in total and for any shopper subgroup appears on each table. The percentages shown have been calculated on the base number. They may not add to 100 percent due to rounding or multiple responses. In all comparisons among shopper groups surveyed, any noted differences are statistically significant.

Analytical Note

While the Australian and American surveys are not identical, many of the questions in this study were also asked of U.S. shoppers in recent Trends studies. In such instances, the text may make reference to the U.S. data for general comparison with that collected in Australia.

SURVEY HIGHLIGHTS

The following summarizes some of the most important findings of this study.

The Consumer's View of the Supermarket

- Overall, shoppers give their usual supermarket an average rating of 7.4 (out of a highest possible score of 10.0), with 16 percent rating the store "9" or "10." Comparable scores for U.S. supermarkets are 7.9 and 29 percent, respectively.

- Interestingly, Australian supermarkets are meeting shopper expectations on "one-stop shopping," or "being able to buy everything from the one shop." This suggests shoppers are not necessarily bothered by visits to various specialty shops to complete their food-shopping needs (Table 1).

- When deciding where to shop for food, Australian shoppers -- like their U.S. counterparts -- care most about quality fruit and vegetables, courteous and friendly staff, quality fresh meat, good/low prices, and good variety or wide selection. Also important are fast checkouts, plenty of parking spaces, nutritional/health information, and convenient location (Table 1).

- Ratings indicate that Australian shoppers want more from their stores. Ratings are notably low on such critical features as quality fruit/vegetables and meat, fast checkouts, and nutritional/health information. Of the nine most important factors, Australian supermarkets meet shoppers' high expectations only with regard to convenient location (Table 3).

- While some shoppers believe Australian supermarkets have improved in a number of areas, most concede that value for money has worsened (Table 6).

Spending and Saving Money

- As of May 1990, Australian shoppers estimate their total weekly grocery expenses average $A94 -- about the same as the United States ($US74 converts to $A90) estimates expense reported by U.S. shoppers as of January 1990 (Table 9).

- To economise on food bills, most Australian shoppers have been using leftovers, planning meals and stocking up on bargains (Table 10).

Shopping Patterns

- Eighty percent of shoppers visit two or more different stores each week for food (with 3 in 10 visiting four or more stores) (Table 14).

- The vast majority (79 percent) shop in only one supermarket on that shopping trip (Table 16).

- Eighty percent have remained loyal to their favorite store. Twenty percent of the shoppers have switched supermarkets mainly because the new store is closer or has lower prices or the shopper has moved (Tables 11 and 12).

- Thursday is the one most popular day for food shopping, and the morning hours are heavily preferred over any other time of day. Shoppers who work and men also like Saturdays and afternoon or evening hours (Tables 18 and 19).

Selection of Store by Product

- Australian shoppers usually visit specialty shops -- rather than a supermarket -- for meat products, fresh fruit and vegetables, and fresh seafood. Supermarkets are the norm for dairy products and soft drinks. They buy bakery goods at supermarkets as well as at speciality shops (Table 22).

- The state in which the shopper resides affects the type of store chosen for meat and fresh produce purchases (Table 23).

Nutrition and Food Safety

- Australian shoppers are at least as concerned as their U.S. counterparts about the nutritional content of food, with both groups caring most about fat content. After that, however, specific areas of concern are quite different. Australians express less than half as much concern about cholesterol, and three to four times more concern than

U.S. shoppers about chemical/artificial additives, freshness/spoilage, nutritional value, and preservatives -- the latter four areas following fat content in rank order of Australian concerns (Tables 25 and 26).

- Like U.S. shoppers, Australians are most likely to rely on themselves as individuals to ensure the safety of the products they buy. Only a handful (5 percent) depend on the Australian government -- one-fourth the level of U.S. shoppers counting on their federal government to ensure product safety (Table 27).

CHAPTER 1

The Consumer's View of the Supermarket

Consumer Expectations and Supermarket Performance

Shoppers were presented with a list of 17 factors and asked the importance of each when deciding where to shop for food (See Table 1). In response, better than 92 percent of the shoppers rate five items very or somewhat important:

- good quality fruit and vegetables,
- courteous and friendly staff,
- good quality fresh meat,
- good/low prices, and
- good variety or wide selection.

The above features have also emerged as the most important in recent Trends studies in the United States.

Next in importance to the Australian shopper, with very/somewhat important ratings from better than 85 percent of the shoppers, are:

- fast checkouts,
- plenty of parking space,
- nutritional/health information, and
- convenient location.

From two-thirds to slightly over three-fourths consider the following items important:

- pleasant surroundings,
- good weekly specials,
- a delicatessen, and
- one-stop shopping.

Of least importance to the Australian when deciding where to shop for food are:

- a bakery;
- longer, extended shopping hours;
- wide range of unbranded products; and
- fresh seafood section.

Analysis reveals few if any differences in importance ratings between men and women. But, the consumer's work status appears to affect some attitudes (See Table 2). For example --

- Pleasant surroundings and good weekly specials are more important to non-working men and women than to their working counterparts.

- A delicatessen and longer, extended shopping hours assume high importance to working men and women relative to those not working.

- Good variety or wide selection and nutritional/health information are much more important to working men than to those who do not work.

Focusing on the nine most important factors, analysis reveals very few differences in importance ratings by age (See Table 3). One notable exception is seen with nutritional/health information, which is much more important to all age groups under age 55 than to older shoppers. Although relatively unimportant among the total sample, longer/extended shopping hours assume very high importance among shoppers under age 25, with demand for this feature dropping steadily as age increase.

By household size, most of the factors assume similar importance among all groups (See Table 4). Exceptions are seen among shoppers from single-person households who put much less importance than those from larger households on good/low prices, good weekly specials, plenty of parking space, a bakery, or fresh seafood.

* * * * *

To determine the Australian supermarkets' responsiveness to shopper needs, respondents were asked to rate their usual supermarket on the same list of features rated on importance (See Table 1).

Focusing on the nine most important factors, ratings indicate the Australian supermarkets are falling far short of what consumers want in four critical areas (See Table 1). This is evidenced by notably low excellent or good scores on --

- good quality fruit and vegetables (50 percent),
- good quality fresh meat (50 percent),
- fast checkouts (54 percent), and
- nutritional/health information (38 percent).

The above ratings are 15 to 38 points lower than comparable scores given U.S. supermarkets in the most recent Trends study. U.S. shoppers, for example, rate their fresh fruit/vegetables and meat at the 86 and 88 percent level.

Scores are more encouraging, although still short of the high expectations of shoppers, on --

- courteous and friendly staff (77 percent),
- good/low prices (64 percent),
- good variety or wide selection (77 percent), and
- plenty of parking space (72 percent).

Only in terms of convenient location are Australian supermarkets meeting shoppers' high expectations (82 percent excellent/good).

Turning to the eight lesser important features, Australian supermarkets are meeting or exceeding shopper demands in terms of --

- one-stop shopping,
- longer, extended shopping hours, and
- wide range of unbranded products.

That Australian supermarkets are meeting shopper expectations on one-stop shopping (being able to buy everything from the one store) suggests shoppers are not bothered by visits to various specialty stores to complete their food-shopping needs.

While employed women rate longer, extended shopping hours more important than does the total sample, analysis shows that Australian supermarkets are far exceeding the demands of these women in this regard.

Relative to what consumers want in a food store, ratings suggest there may be room for improvement in such less critical areas as --

- pleasant surroundings,
- good weekly specials,
- a delicatessen,
- a bakery, and
- fresh seafood section.

Table 1 **How Well Supermarkets Meet Consumer Expectations**

Q: I'm now going to read a list of items that may or may not be important to you when deciding where to shop for food. (RATE EACH ITEM VERY IMPORTANT, SOMEWHAT IMPORTANT, NOT VERY IMPORTANT, OR NOT AT ALL IMPORTANT)

Q: Next I'm going to read out the same list of items. Thinking now about the supermarkets you usually shop at. Would you please tell me how well or badly the supermarket that you usually shop at rates on each item. (RATE EACH ITEM EXCELLENT, GOOD, FAIR, OR POOR)

Base: The shopping public

Base = 1,020*	Very or Somewhat Important	Excellent or Good Rating
	%	%
Good quality fruit and vegetables	99	50
Courteous and friendly staff	96	77
Good quality fresh meat	94	50
Good/low prices	93	64
Good variety or wide selection	93	77
Fast checkouts	89	54
Plenty of parking space	88	72
Nutritional/health information	86	38
Convenient location	86	82
Pleasant surroundings	78	63
Good weekly specials	71	59
Delicatessen	68	57
One-stop shopping	67	66
Bakery	58	50
Longer, extended shopping hours	50	70
Wide range of unbranded products	41	52
Fresh seafood section	36	12

*The sample was split, with 501 respondents asked to rate nine items and 519 asked to rate eight items.

Table 2 **Importance of Supermarket Features, by Sex and Work Status**

Q: I'm now going to read a list of items that may or may not be important to you when deciding where to shop for food. (RATE EACH ITEM VERY IMPORTANT, SOMEWHAT IMPORTANT, NOT VERY IMPORTANT, OR NOT AT ALL IMPORTANT)

Base: The shopping public

	% Rating Feature Very or Somewhat Important						
	May 1990 Total	Men			Women		
		Total	Working	Non-Working	Total	Working	Non-Working
Base*	**1,020**	**303**	**204**	**97**	**717**	**294**	**412**
	%	%	%	%	%	%	%
Good quality fruit and vegetables	99	97	98	96	99	98	100
Courteous and friendly staff	96	92	92	92	98	99	97
Good quality fresh meat	94	91	92	87	96	95	96
Good/low prices	93	89	89	92	95	95	95
Good variety or wide selection	93	90	95	79	94	95	93
Fast checkouts	89	85	84	89	90	95	86
Plenty of parking space	88	86	86	84	88	94	84
Nutritional/health information	86	82	89	68	88	87	88
Convenient location	86	87	89	81	86	87	84
Pleasant surroundings	78	71	67	80	81	76	85
Good weekly specials	71	67	64	74	73	67	76
Delicatessen	68	68	75	52	68	72	65
One-stop shopping	67	63	64	62	69	74	65
Bakery	58	62	61	64	57	58	56
Longer, extended shopping hours	50	60	70	38	46	66	34
Wide range of unbranded products	41	42	41	44	40	42	39
Fresh seafood section	36	32	35	28	37	36	38

*The sample was split, with 501 respondents asked to rate nine items and 519 asked to rate eight items.

Table 3 **Importance of Supermarket Features, by Age**

Q: I'm now going to read a list of items that may or may not be important to you when deciding where to shop for food. (RATE EACH ITEM VERY IMPORTANT, SOMEWHAT IMPORTANT, NOT VERY IMPORTANT, OR NOT AT ALL IMPORTANT)

Base: The shopping public

	% Rating Feature Very or Somewhat Important						
	May 1990 Total	Age					
		Under 25	25-34	35-44	45-54	55-64	65+
Base*	**1,020**	**76**	**227**	**276**	**159**	**129**	**153**
	%	%	%	%	%	%	%
Good quality fruit and vegetables	99	100	98	98	100	100	98
Courteous and friendly staff	96	97	96	96	96	97	95
Good quality fresh meat	94	95	92	96	96	96	93
Good/low prices	93	97	94	96	96	87	89
Good variety or wide selection	93	92	95	95	96	87	89
Fast checkouts	89	84	90	88	93	88	87
Plenty of parking space	88	85	85	94	91	83	80
Nutritional/health information	86	92	91	90	90	78	75
Convenient location	86	92	84	88	84	81	88
Pleasant surroundings	78	82	79	71	80	85	83
Good weekly specials	71	67	71	71	66	75	76
Delicatessen	68	62	79	69	60	72	54
One-stop shopping	67	68	72	66	68	62	65
Bakery	58	69	66	58	51	58	49
Longer, extended shopping hours	50	82	67	54	44	32	19
Wide range of unbranded products	41	51	50	39	39	32	34
Fresh seafood section	36	20	41	38	39	35	29

*The sample was split, with 501 respondents asked to rate nine items and 519 asked to rate eight items.

Table 4 **Importance of Supermarket Features, by Household Size**

Q: I'm now going to read a list of items that may or may not be important to you when deciding where to shop for food. (RATE EACH ITEM VERY IMPORTANT, SOMEWHAT IMPORTANT, NOT VERY IMPORTANT, OR NOT AT ALL IMPORTANT)

Base: The shopping public

	% Rating Feature Very or Somewhat Important					
	May 1990 Total	Household Size				
		One	Two	Three	Four	Five or More
Base*	**1,020**	**120**	**333**	**179**	**206**	**165**
	%	%	%	%	%	%
Good quality fruit and vegetables	99	100	99	96	100	97
Courteous and friendly staff	96	94	99	93	96	95
Good quality fresh meat	94	88	97	92	97	93
Good/low prices	93	85	93	93	93	100
Good variety or wide selection	93	92	92	93	94	95
Fast checkouts	89	85	87	91	89	92
Plenty of parking space	88	76	84	92	91	92
Nutritional/health information	86	82	84	84	90	91
Convenient location	86	92	83	90	78	91
Pleasant surroundings	78	79	78	80	74	81
Good weekly specials	71	43	75	66	74	79
Delicatessen	68	64	67	74	70	64
One-stop shopping	67	66	64	72	64	72
Bakery	58	43	55	61	68	60
Longer, extended shopping hours	50	47	38	61	56	56
Wide range of unbranded products	41	42	38	41	42	45
Fresh seafood section	36	21	39	40	35	37

*The sample was split, with 501 respondents asked to rate nine items and 519 asked to rate eight items.

Overall Satisfaction With Supermarkets

As an overall measure of satisfaction, shoppers were asked to rate their usual supermarket on a 10-point scale, where "1" indicates the store is doing a very poor job and "10" an excellent job in meeting their grocery shopping needs.

On average, Australian shoppers rate their usual supermarket 7.4, with 16 percent giving the store a rating of "9" or "10." Comparable scores for U.S. supermarkets in the most recent Trends study are higher -- 7.9 and 29 percent, respectively.

A number of patterns emerge in the levels of satisfaction among the subgroups of Australian shoppers (See Table 5). Specifically--

- Working men and women indicate much lower satisfaction than their non-working counterparts.
- Shoppers without children give higher scores than those with children.
- Likewise, single-person households rate supermarkets higher than do larger households.
- Satisfaction is extremely low among shoppers under age 35, but increases with age.
- A dramatic decrease in satisfaction occurs as income increases.
- Lesser educated shoppers are more satisfied than those with some college or more.

All of the above patterns also apply to U.S. shoppers. Australian shoppers though, among all subgroups, tend to be less staisfied with their supermarkets relative to their U.S. counterparts.

Table 5 **Consumers Evaluate Their Principal Supermarket**

Q: Next I'd like you to think about the overall job your usual supermarket is doing. On a scale of 1 to 10, where "1" means doing a very poor job and "10" means doing an excellent job, could you please rate the job your usual supermarket is doing in meeting your grocery shopping needs?

Base: The shopping public

	Base	Average Rating (1 to 10 Scale)	Percent Rating Supermarket 9 or 10
			%
Total	1,020	7.4	16
Sex and Work Status			
Men	303	7.2	12
Working	204	7.0	8
Nonworking	97	7.5	22
Women	717	7.5	18
Working	294	7.1	13
Nonworking	412	7.7	21
Type of Household			
With Children	436	7.2	13
No Children	581	7.5	19
Size of Household			
1	120	7.6	23
2	333	7.4	18
3	179	7.2	11
4	206	7.3	15
5 or more	165	7.3	15
Age			
Under 25	76	6.8	8
25-34	227	7.0	7
35-44	276	7.3	15
45-54	159	7.5	20
55-64	129	7.7	22
65 and older	153	8.0	28
Income			
Less than $15,000	166	7.8	29
$15,000 - $24,999	173	7.4	18
$25,000 - $34,999	171	7.2	12
$35,000 - $49,999	188	7.0	8
$50,000 or more	149	7.0	7
Education			
High school or less	680	7.4	19
Some college/college graduate	328	7.2	11

Areas For Improvement

Australian shoppers were asked to consider how their supermarkets may have changed on a number of factors (See Table 6).

- While most feel supermarkets have "stayed the same," in terms of customer service, quality of goods, and friendliness of staff, some shoppers (21-30 percent) report improvements in these areas.

- In terms of variety of goods, shoppers are divided as to whether the situation has improved (48 percent) or stayed the same (45 percent).

- Ratings clearly indicate that in terms of value for money, supermarkets have "become worse" (64 percent).

Shoppers were asked what improvements would make the fresh meat and fresh fruit/vegetable sections in supermarkets more appealing to them (See Table 7). In response, 4 in 10 shoppers offered no suggestions, while 6 in 10 volunteered a change for the better in each section.

- In the fresh meat section, shoppers most often suggest improved packaging, better quality, more variety, lower prices, and fresher products.

- In the fresh fruit/vegetable section, shoppers most frequently ask for fresher products, better quality, and lower prices.

Table 6 **Ways Supermarkets Have Changed**

Q: Thinking about the supermarkets in which you shop. Overall, would you say that (NAME FEATURE) has improved, stayed the same, or become worse?

Base: The shopping public

Base = 1,020		Improved	Stayed the Same	Become Worse	Can't Say
Variety of goods	%	48	45	6	1
Customer service	%	30	56	13	1
Friendliness of staff	%	25	64	10	1
Quality of goods	%	21	64	13	2
Value for money	%	5	29	64	2

Table 7 **Ways Fresh Meat and Fresh Fruit/Vegetable Sections in Supermarkets Could be Improved**

Q: Thinking about the (fresh meat sections) (fresh fruit and vegetable sections) in supermarkets. Overall, what improvements to those sections would make them more appealing to you? What else? Anything else?

Base: The shopping public

	Fresh Meat Section	Fresh Fruit/vegetable Sections
Base	1,020 %	1,020 %
Improved packaging	14	2
Offer better quality	12	17
More variety	12	9
Lower prices	12	15
Fresher products	10	22
Better service	4	2
Presentation	2	3
Environmental concerns	1	1
Other	10	8
Can't say	38	39

CHAPTER 2

Spending and Saving Money

The Weekly Grocery Bill

As of May 1990, Australian shoppers estimate their total weekly grocery expenses at $A94 on average (See Tables 8 and 9). This is approximately the same as the $US74 (converts to $A90) reported by U.S. shoppers in the January 1990 Trends study.

Table 8 **Weekly Family Grocery Expenses**

Q: Each week, about how much in total do you spend on groceries for your family?

Base: The shopping public

	May 1990
Base	**1,020**
	%
$0 - $40	11
$41 - $60	17
$61 - $80	20
$81 - $100	20
$101 - $120	9
$121 - $140	5
$141 - $160	8
$161 and over	7
Refused/can't say	3
Average weekly grocery expenses	$A94

Table 9 **Weekly Family Grocery Expenses, by Size of Household**

Q: Each week, about how much in total do you spend on groceries for your family?

Base: The shopping public

	Base	May 1990 $A
Total	1,020	94
Size of Household		
1	120	46
2	333	75
3	179	98
4	206	118
5 or more	165	127

Saving Money

Shoppers were asked about a number of measures they might adopt to economise on food bills. (See Table 10) Very few shoppers indicate having "recently" undertaken any money-saving behavior (3 to 7 percent). Instead, many Australians report they "have been doing and will continue doing" the following:

- using leftovers (72 percent),
- meal planning (65 percent),
- stocking up on good bargains (53 percent),
- buying more store brands and lower priced brands (46 percent),
- taking lunch to work (44 percent),
- eating out less often (39 percent), or
- buying larger quantities of food (34 percent).

Table 10 **Steps Taken to Economise on Food Bills**

Q: Next, I'd like you to consider some things that other people have told us they do to economise on their food bills. Is.... something that you've been doing and will continue to do, you've just begun recently, you may do in the future, or doesn't it apply to you?

Base: The shopping public

Base = 1,020		Been Doing and Will Continue	Just Begun Recently	May Do In Future	Doesn't Apply to Me
Using leftovers	%	72	3	1	24
Meal planning	%	65	3	4	28
Stocking up when you find a good bargain	%	53	4	7	36
Buying more store brands and lower priced brands	%	46	5	7	42
Taking lunch to work	%	44	3	2	51
Eating out less often	%	39	7	4	50
Buying larger quantities of food	%	34	4	6	56

CHAPTER 3

Shopping Patterns

Store Loyalty

When asked if they are now shopping at the same supermarket as 12 months ago, 80 percent of Australian shoppers said they are. Only 20 percent indicate having switched stores (See Table 11). This compares with 27 percent of U.S. shoppers in the 1990 Trends survey.

By respondent subgroup, a number of patterns emerge among Australian shoppers:

- Working men and women are much more likely than their nonworking counterparts to have switched supermarkets.
- The incidence of switching is quite high among shoppers under age 25 (42 percent) and decreases dramatically as age increases.
- Middle income shoppers are more likely to have switched supermarkets than are those in the lowest and highest income groups.
- Persons with some college or more are more apt to switch stores than are lesser educated shoppers.

The major reasons for having switched supermarkets (See Table 12) are:

- convenient location/new store is closer (32 percent),
- moved (28 percent),
- better/lower prices/specials (21 percent), and
- bigger/more variety/more selection (15 percent).

Table 11 **Store Loyalty**

Q: Thinking about this time 12 months ago. Were you then doing most of your grocery shopping at the same supermarket as now?

Base: The shopping public

	Base		Switched Stores Yes	No
Total	1,020	%	20	80
Sex and Work Status				
Men	303	%	20	80
Working	204	%	24	76
Nonworking	97	%	12	88
Women	717	%	20	80
Working	294	%	24	76
Nonworking	412	%	18	82
Age				
Under 25	76	%	42	58
25-34	227	%	28	72
35-44	276	%	23	77
45-54	159	%	15	85
55-64	129	%	8	92
65 and older	153	%	8	92
Income				
Less than $15,000	166	%	16	84
$15,000 - $24,999	173	%	20	80
$25,000 - $34,999	171	%	22	78
$35,000 - $49,999	188	%	28	72
$50,000 or more	149	%	17	83
Education				
High school or less	680	%	19	81
Some college/college graduate	328	%	23	77

Table 12 **Reasons For Store Switching**

Q: For what reasons did you switch? Why else?

Base: Those who switched supermarkets

	May 1990
Base	**207**
	%
Convenient location/new store is closer	32
Moved	28
Better/lower prices/specials	21
Bigger/more variety/more selection	15
Better service	8
Better parking	6
Better surroundings	6
New supermarket/shopping center	6
Better fruit/vegetables	1
Better meats	*
Other	5
Can't say	3

* Less than 0.5 percent.

Visits to Food Stores in an Average Week

When asked how many visits they make to "food stores" in an average week (See Table 13)--

- 25 percent of Australian shoppers make only one trip,
- 35 percent make two or three visits, and
- 37 percent make four or more trips.

In the January 1990 Trends survey, only 1[illegible]rcent of U.S. shoppers reported four or more visits to "supermarkets."

By shopper subgroup, we find a number of patterns in the number of food store visits:

- Non-working Australian women make fewer visits than do their working counterparts (29 percent versus 43 percent four or more visits).

- Shoppers aged 55 or over report fewer visits than those younger (24-27 percent versus 37-43 percent four or more visits).

- The incidence of four or more visits per week increases with size of household (from 30 percent among single-person households to 43 percent among 4- and 5- person households).

In addition to the number of visits they make to food stores, Australian shoppers were asked about the number of different stores they visit each week for food shopping (See Table 14). In response --

- 17 percent report one store,
- 52 percent visit two or three stores, and
- 31 percent visit four or more food stores per week.

Australians who live in the city visit more stores than do those residing in the country (37 percent versus 18% four or more per week).

Residents of New South Wales visit the most food stores (38 percent four or more) and shoppers in Tasmania visit the fewest stores (17 percent four or more) per week.

The large majority of shoppers report they visit the same stores each time (73 percent) and shop in only one supermarket (79 percent) (See Tables 15 and 16).

Those few who shop in more than one supermarket do so mainly because they need items not available in every store or they find some products are lower priced or on sale at another supermarket (See Table 17).

Table 13 **How Often Shoppers Go to Food Stores in an Average Week**

Q: About how many visits, in total, do you make to stores in an average week? That includes going to the same store more than once, and going to different supermarkets.

Base: The shopping public

			Number of Visits							
	Base		1	2	3	4	5	6+	Every two weeks	Average
Total	**1,020**	%	25	19	16	12	11	14	2	3.24
Sex and Work Status										
Men	**303**	%	27	14	16	12	9	20	2	3.50
Working	**204**	%	29	12	15	12	7	23	1	3.59
Nonworking	**97**	%	22	16	19	12	13	14	3	3.37
Women	**717**	%	24	22	16	12	11	12	2	3.13
Working	**294**	%	22	21	13	13	14	16	1	3.43
Nonworking	**412**	%	26	23	18	11	9	9	2	2.88
Age										
Under 25	**76**	%	21	25	17	9	8	20	-	3.47
25 - 34	**227**	%	21	20	13	9	12	21	2	3.62
35 - 44	**276**	%	22	18	14	17	11	15	2	3.40
45 -54	**159**	%	31	16	13	14	13	11	1	3.05
55 - 64	**129**	%	32	16	25	7	9	8	2	2.80
65 and older	**153**	%	26	24	20	10	8	9	3	2.84
Size of Household										
1	**120**	%	30	21	16	13	8	9	1	2.88
2	**333**	%	29	21	16	11	10	10	2	2.90
3	**179**	%	22	22	15	11	10	18	1	3.47
4	**206**	%	22	16	16	11	13	19	2	3.57
5 or more	**165**	%	20	16	16	14	12	17	4	3.50

Table 14 **Number of Different Stores Visit Each Week for Food Shopping**

Q: About how many different stores, in total, do you usually visit each week to do your food shopping?

Base: The shopping public

	Base		Number of Different Stores					
			1	2	3	4	5	6 or more
Total	**1,020**	%	17	23	29	17	7	7
Where Live								
City	**619**	%	12	19	30	20	9	8
County	**401**	%	23	30	27	10	4	4
State								
New South Wales	**377**	%	12	19	29	20	10	8
Victoria	**264**	%	16	27	28	14	8	7
Queensland	**161**	%	23	22	30	16	5	4
South Australia	**98**	%	19	28	30	13	4	6
Western Australia	**90**	%	23	29	23	16	2	3
Tasmania	**30**	%	17	23	43	10	-	7

Table 15 **Food Store Loyalty**

Q: Do you visit the same stores each time or do you visit different ones from time to time?

Base: The shopping public

	May 1990
Base	**1,020**
	%
Same stores each time	73
Visit different stores from time to time	27

Table 16 **Number of Supermarkets Usually Shop**

Q: Thinking of the last time you went grocery shopping in a supermarket. Did you do all of your shopping in one supermarket, or in more than one supermarket?

Base: The shopping public

	May 1990
Base	**1,020**
	%
Shop in one supermarket	79
Shop in more than one supermarket	21

Table 17 **Reasons Shop in More Than One Supermarket**

Q: Why did you shop in more than one supermarket that last time?

Base: Respondents who shopped in more than one supermarket

	May 1990
Base	**215**
	%
Particular items not available at one supermarket	38
Items on sale	30
Everyday prices lower on some items	23
Better fruit and vegetables at another supermarket	8
Better meats at another supermarket	8
Extra items	3
Forgotten items	3
Better seafood at another supermarket	1
Other reasons	6

Day and Time Usually Shop

Thursday is the one most popular day for food shopping in Australia (32 percent). This may be due to the fact that many supermarkets have extended trading hours on Thursday night vs restricted evening hours during most of the week. One-fourth say they shop on no special day (See Table 18). While the incidence of Saturday shopping is low in total (12 percent), it is a popular day for working people and younger shoppers.

As for time of day for food shopping, the morning hours are most popular in Australia (40 percent) (See Table 19). By work status and age, we find that --

- The morning hours are much more favored by nonworking shoppers and older respondents.
- Working shoppers and those under age 35 are as likely to shop in the afternoon or early evening as in the morning.

Table 18 **Day of Week Most Shopping Done**

Q: On what day of the week do you do most of your shopping, or isn't there a special day?

Base: The shopping public

	Base		Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	No Special Day
Total	**1,020**	%	4	5	8	32	14	12	25
Work Status									
Working	**498**	%	3	3	7	32	13	20	22
Nonworking	**509**	%	5	7	10	31	15	4	28
Age									
Under 25	**76**	%	5	4	5	31	13	25	17
25 - 34	**227**	%	5	4	5	32	12	17	25
35 - 44	**276**	%	4	5	10	32	16	13	20
45 -54	**159**	%	3	7	9	31	13	11	26
55 - 64	**129**	%	2	9	9	36	10	4	30
65 and older	**153**	%	2	5	12	32	18	1	30

Table 19 **Time of Day Usually Shop**

Q: What time of the day do you usually do your shopping -- in the morning, around noon, in the afternoon, early evening, or late evening?

Base: The shopping public

	Base		Morning	Around Noon	Afternoon	Early Evening	Late Evening	No Special Time
Total	**1,020**	%	40	11	19	14	5	11
Work Status								
Working	**498**	%	28	11	23	24	7	7
Nonworking	**509**	%	52	12	15	5	2	14
Age								
Under 25	**76**	%	30	9	13	30	11	7
25 - 34	**227**	%	33	12	26	14	6	9
35 - 44	**276**	%	41	10	19	19	5	6
45 -54	**159**	%	35	8	20	18	4	15
55 - 64	**129**	%	47	12	18	7	3	13
65 and older	**153**	%	54	15	13	1	-	17

Time-Saving Measures

Australian shoppers were asked about a number of steps they might take to save time when grocery shopping (See Table 20). Time-saving behavior reported "nearly every time" they shop focuses on --

- buying only the items needed (53 percent), and
- going to the supermarket at a particular time of day to avoid crowds (37 percent).

The large majority claim they never do the following to save time:

- go to a convenience store instead of a supermarket;
- choose a supermarket with a faster checkout lane;
- buy larger quantities to reduce the number of shopping trips; or
- buy fewer items so the quick checkout lane can be used.

Table 20 **Steps Taken to Save Time When Shopping**

Q: People do different things to save time when shopping. As I read out some statements, please tell me how often you personally do this to save time when grocery shopping -- nearly every time you shop, fairly often, occasionally, or never.

Base: The shopping public

Base = 1,020		Nearly Every Time	Fairly Often	Occasionally	Never
Buy only the items you know you need	%	53	24	14	9
Go to the supermarket at a particular time of day to avoid crowds	%	37	13	12	38
Shop at a particular supermarket because it has a better or faster checkout system	%	19	10	9	62
Buy larger quantities in order to reduce the number of shopping trips you have to make	%	18	9	17	56
Buy only enough items so that you can use the quick checkout lane	%	4	6	22	68
Go to a convenience store rather than a supermarket	%	2	4	24	70

Unplanned Purchases

The large majority of Australian shoppers (67 percent) report buying "only what was needed" the last time they shopped (See Table 21). One-fourth reported having purchased impulse items or things on sale.

Within each respondent subgroup, most shoppers bought only necessary items. But, the following patterns of impulse and sale purchases are noted:

- As shopper age increases, impulse buying decreases and sale purchases increase in popularity.
- The incidence of purchasing items on sale increases with household size.
- Shoppers with children are more likely than their counterparts to buy both impulse and sale items.
- While the incidence of sale purchases is quite similar across all income levels, impulse purchasing becomes more popular as income increases.

Table 21 **Unplanned Purchases Last Time Shopped**

Q: And did you buy only what you needed, buy some impulse items, or stock up on things that were on sale even if you hadn't planned to the last time you went shopping?

Base: The shopping public

	Base		Purchases Last Time: Only What Was Needed	Impulse Items	Items on Sale
Total	1,020	%	67	26	25
Age					
Under 25	76	%	64	34	14
25-34	227	%	63	30	25
35-44	276	%	67	28	30
45-54	159	%	66	27	25
55-64	129	%	72	22	22
65 and older	153	%	72	15	24
Size of Household					
1	120	%	78	20	17
2	333	%	69	22	22
3	179	%	65	28	23
4	206	%	62	34	27
5 or more	165	%	63	26	35
Type of Household					
With children	436	%	63	31	31
No children	581	%	70	22	21
Income					
Less than $15,000	166	%	74	16	24
$15,000 - $24,999	173	%	69	20	24
$25,000 - $34,999	171	%	68	27	22
$35,000 - $49,999	188	%	62	28	29
$50,000 or more	149	%	65	35	26

CHAPTER 4

Overview of Shopping Behavior

The Australian shopper does not necessarily purchase all food items at a supermarket. Specialty stores are often used for meat, produce, seafood and baked goods (See Table 22). Specifically --

- While supermarkets are the major source for dairy products (88 percent) and soft drinks for home consumption (79 percent), most shoppers visit a butcher or delicatessen for meat products (60 percent), a "greengrocer" for fresh fruit and vegetables (59 percent), and a "fish shop" for fresh seafood (76 percent).
- Supermarkets are in distant second place for meat (36 percent), fresh fruit/vegetables (34 percent) and fresh seafood (12 percent).
- For bakery products, Australians use supermarkets (53 percent) as well as "cake or hot bread shops" (41 percent).

As for non-food items, supermarkets are the major source for health and beauty-care products/toiletries/non- prescription drugs (67 percent), but are infrequently used for paper goods such as greeting cards, wrapping and writing paper (18 percent), flowers/plants (14 percent), or magazines (9 percent).

Geographic area appears to influence where shoppers go for meat products and fresh fruit or vegetables (See Table 23). That is --

- For meat products, supermarkets are used as often as specialty stores by residents of South Australia, Western Australia, and Tasmania. But, butchers or delicatessens are strongly favored over supermarkets in New South Wales, Victoria, and Queensland.
- For fresh fruit and vegetables, shoppers in New South Wales and Queensland usually shop at greengrocers, while those in other areas are nearly as apt to use supermarkets as specialty stores. Country residents are much more likely than their city counterparts to purchase fresh fruit/vegetables in a supermarket.
- For items such as dairy or health and beauty care products, supermarkets are the major choice regardless of geographic area.

Table 22 **Type of Store Usually Shop For Selected Items**

Q: Where do you usually buy.....?

Base: The shopping public that purchases these items

	Base		Type of Store			
			Super-market	Specialty store	Depart-ment/ Discount Store	Other
Dairy products	1008	%	88	6	1	5
Soft drinks for home consumption	835	%	79	-	1	20
Health and beauty care products, including toiletries/non-prescription drugs	999	%	67	26	4	3
Bakery products/cakes	937	%	53	41	1	5
Meat products	975	%	36	60	1	3
Fresh fruit/vegetables	1006	%	34	59	1	6
Paper goods such as greeting cards, wrapping/writing paper	991	%	18	75	4	3
Flowers/plants	830	%	14	80	3	3
Fresh seafood	669	%	12	76	*	11
Magazines	842	%	9	85	*	6

* Less than 1 percent

Table 23 **Type of Store Usually Shop For Meat Products and Fresh Fruit/Vegetables, by Geographic Area**

Q: Where do you usually buy.....?

Base: The shopping public

	Base		Type of Store: Super-market	Specialty store	Other	Don't buy
Meat Products						
Total	1,020	%	34	58	4	4
State						
New South Wales	377	%	28	65	3	4
Victoria	264	%	34	56	6	4
Queensland	161	%	30	65	1	4
South Australia	98	%	51	43	2	4
Western Australia	90	%	50	41	3	6
Tasmania	30	%	50	43	-	7
Fresh Fruit/Vegetables						
Total	1,020	%	34	58	7	1
State						
New South Wales	377	%	24	71	4	1
Victoria	264	%	40	49	10	1
Queensland	161	%	35	58	6	1
South Australia	98	%	45	49	6	-
Western Australia	90	%	41	47	12	-
Tasmania	30	%	43	40	10	7
Where Live						
City	619	%	26	66	7	1
Country	401	%	46	46	7	1

Table 24 **Type of Store Usually Shop For Dairy Products and Health and Beauty Care Products by Geographic Area**

Q: Where do you usually buy.....?

Base: The shopping public

	Base		Type of Store: Super-market	Specialty store	Other	Don't buy
Dairy Products						
Total	1,020	%	87	6	6	1
State						
New South Wales	377	%	86	5	7	2
Victoria	264	%	88	10	1	1
Queensland	161	%	88	4	7	1
South Australia	98	%	95	3	2	-
Western Australia	90	%	84	3	13	-
Tasmania	30	%	87	10	3	-
Health and Beauty Care Products						
Total	1,020	%	66	25	7	2
State						
New South Wales	377	%	67	23	8	2
Victoria	264	%	66	27	6	1
Queensland	161	%	70	22	7	1
South Australia	98	%	70	20	7	3
Western Australia	90	%	49	39	10	2
Tasmania	30	%	67	30	3	-

CHAPTER 5

Nutrition and Food Safety

Nutritional Content

Ninety-three percent of Australian shoppers say they are very or somewhat concerned about the nutritional content of the food they and their families eat. Sixty-two percent are very concerned (See Table 25). Comparable percentages in the 1990 U.S. Trends study were 95 percent and 55 percent, respectively.

Subgroup analysis of those very or somewhat concerned indicates that --

- Australian men who do not work are significantly less concerned about nutrition.
- Shoppers with children indicate more concern than those without children.
- The highest levels of concern are seen among shoppers age 25 to 44.

Among shoppers who show concern about the nutritional content of the foods they eat, the main areas of concern are many (See Table 26). Specifically --

- fat content (32 percent),
- chemical/artificial additives (30 percent),
- freshness/purity/spoilage (27 percent),
- good food/nutritional value (24 percent),
- preservatives (23 percent),
- cholesterol content (20 percent), and
- salt/sodium content (20 percent).

Fat content is the number one area of concern in tne U.S. as well as in Australia. Chemical additives, however, have not been among the top three concerns in the U.S. since 1985.

Compared with the areas of concern named by U.S. shoppers in the 1990 Trends report, shoppers express--

- Low fat content is considered most important by all, but at a lower level by Australians.

- No chemical/artificial additives is the second highest concern in Australia, but ranks 11th by U.S. shoppers.

- Freshness/purity/spoliage is considered about seven times more important in Australia.

- U.S. shoppers have over twice as much concern about cholesterol.

Table 25 **Level of Shoppers' Concern About the Nutritional Content of Foods**

Q: How concerned are you about the nutritional content of the food your family eats? Would you say you and your household are very concerned, somewhat concerned, not very concerned, or not at all concerned?

Base: The shopping public

	Base		Degree of Concern			
			Very Concerned	Somewhat Concerned	Not Very/ Not at All Concerned	Can't Say
Total	1,020	%	62	31	7	*
Sex and Work Status						
Men	303	%	55	34	11	0
Working	204	%	59	37	4	0
Nonworking	97	%	45	28	27	0
Women	717	%	65	30	5	*
Working	294	%	64	31	4	*
Nonworking	412	%	65	29	6	0
Type of Household						
With children	436	%	65	31	3	*
No children	581	%	59	31	10	0
Age						
Under 25	76	%	50	43	7	0
25-34	227	%	63	34	3	0
35-44	276	%	67	29	3	*
45-54	159	%	60	33	7	0
55-64	129	%	60	30	10	0
65 and older	153	%	58	26	16	0

* Less than 0.5 percent

Table 26 **Nature of Shoppers' Concern About the Nutritional Content of Foods**

Q: What is it about the nutritional content of what you eat that concerns you and your family most? What else concerns you and your family?

Base: Those who are very, somewhat, or not very concerned about the nutritional content of what they eat

	May 1990
Base	**1,004**
	%
Low fat content	32
No chemical/artificial additives	30
Freshness, purity, no spoilage	27
Good food/nutritional value	24
No preservatives	23
Low cholesterol	20
Less salt/sodium content	20
Less sugar content	17
High vitamins/mineral content	14
High fibre content	7
Low calories	3
Making sure we get a balanced diet	2
MSG	1
Pesticides	1
Ingredients/content	1
Desire to be healthy/eat what's good for us	*
Excess food coloring, dyes, empty calories, junk food	*
Protein value	*
Less red meat	*
Other	5
Can't say/refused	6

* Less than 0.5 percent

Responsibility for Food Safety

When asked who they rely on most to ensure the safety of the products they buy (See Table 27), Australian shoppers -- like their U.S. counterparts are most likely to depend on themselves as individuals (50 percent). In distant second place, they mention manufacturers (19 percent). Very few rely on the Australian government to ensure product safety (5 percent) -- one-fourth the level of U.S. shoppers depending on their federal government.

Table 27 **Those on Whom Shoppers Rely to Ensure That the Products They Buy are Safe**

Q: As far as you personally are concerned, who do you rely on most to be sure that the products you buy are safe: the Australian government, the state government, consumer organisations, manufacturers, retailers or yourself as an individual?

Base: The shopping public

	May 1990
Base	**1,020**
	%
Yourself as an individual	50
Manufacturers	19
Consumer organisations	10
Retailers	9
Government	7
Australian	5
State	2
Other	2
None	1
Can't say	2

METHODOLOGY

Selection of the Sample

The data for this survey were collected from 1,020 telephone interviews conducted in May 1990 by the Roy Morgan Research Centre Pty. Ltd. Persons with the following three criteria qualified for an interview:

- Male or female head of household.
- Having primary or equally shared responsibility for food shopping.
- Having shopped for groceries in the past two weeks.

The sample is a nationwide cross section of shoppers, and all subpopulation percentages are projectable to the Australian shopping public as a whole. A profile of the total sample is shown in Table 28.

Sampling Error

It is important to note that all survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 29 shows the range of error for samples of four different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example illustrates this process.

As shown in Table 8 of this report, 20 percent of those surveyed this year spend $61 to $80 each week on groceries for their families. This percentage is based on the total sample of 1,020 shoppers. From the table below, the sampling error associated with a 20 percent response for a sample of 1,000 is plus or minus 2.5 percentage points. If one applies this sampling error to the 20 percent response in Table 10, the true proportion of shoppers who spend $61 to $80 a week should be no less than 17.5 percent, and no more than 22.5 percent.

Aside from knowing the sampling error of any given finding, one may also be interested in whether the differences between certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, in Table 5 there is a 14-point difference between the percentage of working men who rate the overall job of their usual supermarket as a "9" or "10" on a 1 to 10 scale and the percentage of nonworking men who do this. Although this 14-point difference seems large, it could be due to sampling error. To determine whether this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample sizes, the less likely a reported difference will be due to sampling error.

In Table 30, the minimum percentage difference that must occur to be considered real is shown for varying sample sizes and varying percent responses.

In the previous example from Table 5, 204 working men were asked how they would rate the overall job their usual supermarket is doing, of whom 8 percent gave a rating of "9" or "10." A total of 97 nonworking men were asked the same question, and 22 percent gave a rating of "9" or "10." These sample sizes are closest to the 200 vs. 100 sample size row of the table. The two percentages are closest to the 6 percent or 90 percent column. From the table, the minimum difference between percentages that would not be due to sampling error is 7 points. Because the difference between 8 percent and 22 percent exceeds this minimum, one can safely assume that fewer working men than nonworking men rate the overall job of their usual supermarket as a "9" or "10."

Table 28 **Demographic Profile of Food Store Shoppers: May 1990**

Base: The shopping public

	Number in Sample	Percentage in Sample
Total	1,020	100
	%	%
Sex and Work Status		
Men	303	30
Working	204	20
Nonworking	97	10
Women	717	70
Working	294	29
Nonworking	412	40
Type of Household		
With children	436	43
No children	581	57
Age		
Under 25	76	7
25 - 34	227	22
35 - 44	276	27
45 - 54	159	16
55 - 64	129	13
65 and older	153	15
Income		
Less than $15,000	166	16
$15,000 - $24,999	173	17
$25,000 - $34,999	171	17
$35,000 - $49,999	188	18
$50,000 or more	149	15
Can't say/refused	173	17
Marital Status		
Single/separated/divorced/widowed	743	73
Married/de facto	273	27
Education		
High school or less	680	67
Some college/college grad	328	32
Where Live		
City	619	61
Country	401	39
State		
New South Wales	377	37
Victoria	264	26
Queensland	161	16
South Australia	98	9
Western Australia	90	9
Tasmania	30	3

Table 29 **Sampling Error (+/-) at 95 Percent Confidence Level for Samples of Four Different Sizes**

Percentage Response	Size of Sample 1000	600	400	100
	%	%	%	%
10(90)	1.9	2.4	2.9	5.9
20(80)	2.5	3.2	3.9	7.8
30(70)	2.8	3.7	4.5	9.0
40(60)	3.0	3.9	4.8	9.6
50(50)	3.1	4.0	4.9	9.8

Table 30 **Sampling Error of Difference Between Proportions**

Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size of Two Groups Asked Question on Which Survey Results Are Based	Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
1,000 vs. 1,000	3	4	4	4	4
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
500 vs. 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
300 vs. 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
200 vs. 200	6	8	9	10	10
100	7	10	11	12	12
100 vs. 100	8	11	13	14	14